

Chapter 3

Managing Enrollments, Attendance, and Cancellations

Chapter Overview

Introduction This chapter explains the process of managing enrollments, attendance, and cancellations in OTA.

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See Also



In this Module:

Overview

Section: Querying OTA Windows

Chapter 1, [Completing the Training Request Form](#)

Chapter 2, Defining an Activity

Section: [Scheduling an Event](#)

Chapter 4, Exporting Retrieved Data

Module 4, Staffing in the Modern DCPDS

Chapter 2, Building An External User

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Enrolling an Employee

Purpose

- This section guides you through the steps to set up and enter student enrollments for Events using status to track enrollments, to enter multiple enrollments, and to make mass updates.
- Enrolling an employee is the action that follows Scheduling an Event.

Before You Begin

- You should access the **Search for Event** Window on the **Navigation List** through *Enrollments*. Although you can access **Event Search** through *Events*, the remaining windows will not display.
- If you have accessed the **Search for Event** and **Enrollment Summary** Windows to locate an Event and review enrollments, you can later go directly to the **Enrollment Details** Window. Exit the first two windows without doing a query, open the **Enrollment Details** Window and with your cursor in the *Event Title* data field, click the LOV. Select the Event you need. Or Use the <Functions> key to navigate between windows.
- The system tells you when you've reached the maximum number of enrollments.
- If you have more requested enrollments than available quotas, you need to decide which enrollments to place and which to put on a waiting list in case of cancellations.
- Booking priorities for civilian training are those defined by DoD and include:
 - Critical/Mandated
 - Essential
 - Recommended
- You can enroll students into events in advance or retrospectively by changing the enrollment date(s) in the Scheduled Events window.
- The system does not allow you to enroll the same student twice.
- ◆ **Example:** If you have a scheduled event running from 05 to 08 January 2001, with enrollment dates from 01 December 2000 to 31 December 2000 and you want to enroll a student today (10 July 2000), change the enrollment start date to 10 July 2000.
- The <History> Taskflow button on the **Enrollment Details** Window tells you which Events the employee has completed and is currently enrolled in.



Note: You cannot change the enrollment date in the **Enrollments Details** Window. The enrollment start date must be changed on the **Scheduled Event** Window.

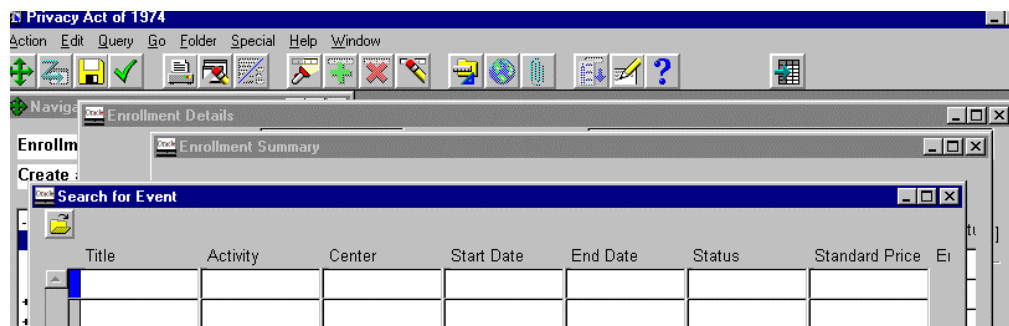
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Enrolling an Employee, Continued

Cascading OTA Windows

- When you make a selection from the **Navigation List**, all windows needed for a procedure display in cascaded order on your screen. Start with the top window and when you finish each window, exit to the next window.
- If you work from the top window and exit each time, all windows needed for the action are in sequential order.

◆ Example:

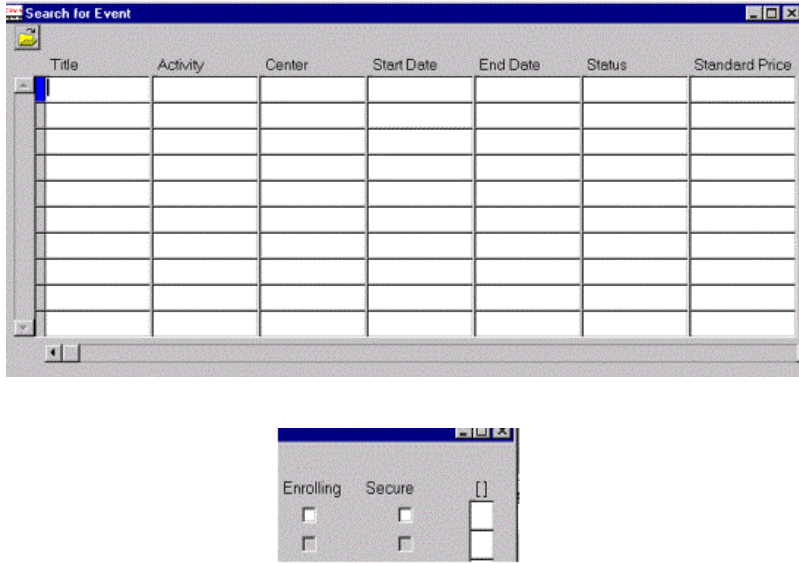


- If you need to toggle to another window, click the **<Functions>** Taskflow button on the Enrollment Summary or Enrollment Details Windows. You may want to use this feature if you are enrolling employees and want to check the roster or if you are enrolling students in a number of different events.

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Enrolling an Employee, Continued


Searching for an Event

Step	Action												
1	On the Navigation List → <i>Enrollments</i> → <i>Student</i> → <Open> .												
2	<p>The Search for Event Window displays with seven columns and two checkboxes.</p> <p>◆ Example:</p>  <p>Use the bottom scroll bar to review the checkboxes.</p> <table border="1"> <thead> <tr> <th>Data Fields and Boxes</th><th>Description</th></tr> </thead> <tbody> <tr> <td>Title</td><td>A system-generated number or name you have assigned.</td></tr> <tr> <td>Activity</td><td>Self-explanatory.</td></tr> <tr> <td>Center</td><td>Sponsoring location.</td></tr> <tr> <td>Start Date</td><td>Self-explanatory.</td></tr> <tr> <td>End Date</td><td>Self-explanatory.</td></tr> </tbody> </table>	Data Fields and Boxes	Description	Title	A system-generated number or name you have assigned.	Activity	Self-explanatory.	Center	Sponsoring location.	Start Date	Self-explanatory.	End Date	Self-explanatory.
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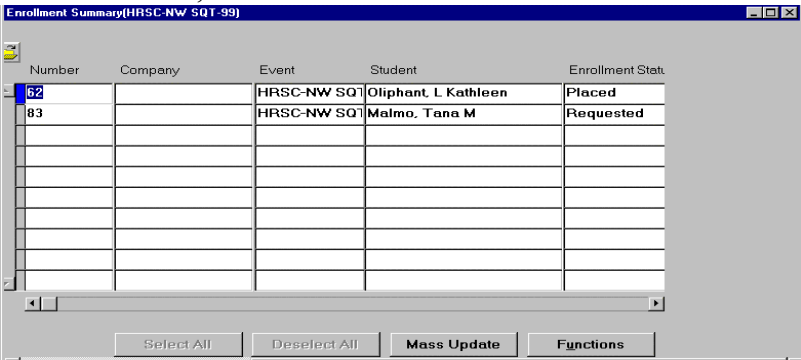
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Enrolling an Employee, Continued

Event (continued)

Step	Action												
2 (cont)	<table> <tr> <th>Data Fields and Boxes</th><th>Description</th></tr> <tr> <td>Status</td><td>Status of Enrollment such as Normal, Placed, Completed.</td></tr> <tr> <td>Standard Price</td><td>Cost per student enrollee.</td></tr> <tr> <td>Enrolling Checkbox</td><td>If selected, enrollment is open.</td></tr> <tr> <td>Secure Checkbox</td><td>If selected, enrollment is limited to the organization sponsoring it.</td></tr> <tr> <td>DDF</td><td>Displays Agency Group code, i.e., AF for AF. Click to open the Additional Event Information.</td></tr> </table>	Data Fields and Boxes	Description	Status	Status of Enrollment such as Normal, Placed, Completed.	Standard Price	Cost per student enrollee.	Enrolling Checkbox	If selected, enrollment is open.	Secure Checkbox	If selected, enrollment is limited to the organization sponsoring it.	DDF	Displays Agency Group code, i.e., AF for AF. Click to open the Additional Event Information.
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3 	<p>Query the Search for Event Window for the Event you need, place the Record Indicator on the Event Title, and exit the window.</p> <p>Note: The Enrolling Checkbox will tell you if the Event is still open for enrollment.</p>												

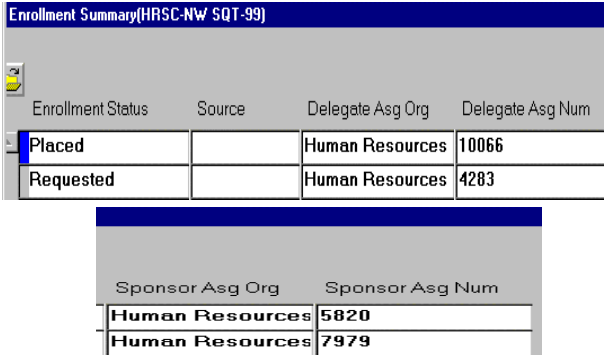
Using the Enrollment Summary

Step	Action
1	<p>The Enrollment Summary Window displays the Event, any students enrolled, and their Enrollment status:</p> 

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Enrolling an Employee, Continued

Using the Enrollment Summary (continued)

Step	Action																								
1 (cont)	<p>Use the bottom scroll bar to review remaining columns:</p>  <table border="1"> <thead> <tr> <th>Data Fields and Buttons</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>Number</td><td>System-generated once you click Save.</td></tr> <tr> <td>Company</td><td></td></tr> <tr> <td>Event</td><td>The one you selected.</td></tr> <tr> <td>Student</td><td>Self-explanatory.</td></tr> <tr> <td>Enrollment Status</td><td>Placed, Requested, etc.</td></tr> <tr> <td>Source</td><td></td></tr> <tr> <td>Delegate Asg Org</td><td>Organization the student is assigned to.</td></tr> <tr> <td>Delegate Asg Num</td><td>System-generated.</td></tr> <tr> <td>Sponsor Asg Num</td><td>Organization sponsoring the Event.</td></tr> <tr> <td>Select All Button</td><td>Grayed out, used in mass updating.</td></tr> <tr> <td>Deselect All Button</td><td>Grayed out, used in mass updating.</td></tr> </tbody> </table>	Data Fields and Buttons	Description/Action	Number	System-generated once you click Save.	Company		Event	The one you selected.	Student	Self-explanatory.	Enrollment Status	Placed, Requested, etc.	Source		Delegate Asg Org	Organization the student is assigned to.	Delegate Asg Num	System-generated.	Sponsor Asg Num	Organization sponsoring the Event.	Select All Button	Grayed out, used in mass updating.	Deselect All Button	Grayed out, used in mass updating.
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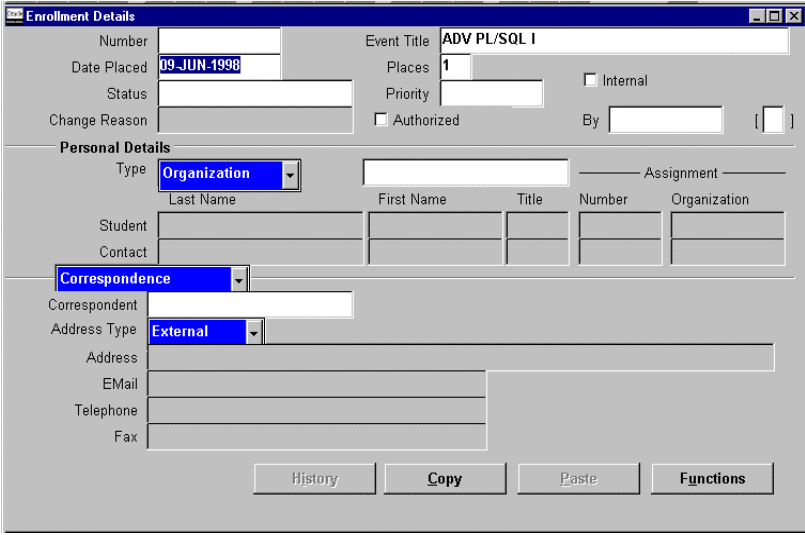
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Enrolling an Employee, Continued

Using the Enrollment Summary (continued)

Step	Action						
1 (cont)	<table border="1"> <thead> <tr> <th>Data Fields and Buttons</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>Mass Update Button</td><td>Used to update more than one nomination.</td></tr> <tr> <td>Functions Button</td><td>Use to toggle to other windows; i.e. click on <i>Event Search</i> to return to that window or click <i>New Enrollment</i> to go to a blank window.</td></tr> </tbody> </table>	Data Fields and Buttons	Description/Action	Mass Update Button	Used to update more than one nomination.	Functions Button	Use to toggle to other windows; i.e. click on <i>Event Search</i> to return to that window or click <i>New Enrollment</i> to go to a blank window.
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2	Exit the window. The Enrollment Details Window displays.						

Completing the Enrollment Details Window

Step	Action
1	<p>With the cursor in the <i>Status</i> data field, complete the following:</p> 

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Enrolling an Employee, Continued

Completing the Enrollment Details Window (continued)

Step	Action																						
1 (cont)	<table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td>Number</td><td>Do not use. System generated number which displays when you-open the window after saving. Future use with Finance.</td></tr> <tr> <td>Date Placed</td><td>Auto-populates from Event.</td></tr> <tr> <td>Status</td><td>Click the LOV. (Placed, waitlisted, etc.)</td></tr> <tr> <td>Change Reason</td><td>Grayed out; opens when Status is changed</td></tr> <tr> <td>Event Title</td><td>Auto-populates from Event.</td></tr> <tr> <td>Places</td><td>Defaults to 1. Not used at this time.</td></tr> <tr> <td>Priority</td><td>Click the LOV. (1, 2, 3, or 0)</td></tr> <tr> <td>Internal Checkbox</td><td>Not used by DoD.</td></tr> <tr> <td>Authorized Checkbox</td><td>Select the checkbox.</td></tr> <tr> <td>By</td><td>Auto-populates with name of authorized person enrolling the employee.</td></tr> </table>	Data Field	Description/Action	Number	Do not use. System generated number which displays when you-open the window after saving. Future use with Finance.	Date Placed	Auto-populates from Event.	Status	Click the LOV. (Placed, waitlisted, etc.)	Change Reason	Grayed out; opens when Status is changed	Event Title	Auto-populates from Event.	Places	Defaults to 1. Not used at this time.	Priority	Click the LOV. (1, 2, 3, or 0)	Internal Checkbox	Not used by DoD.	Authorized Checkbox	Select the checkbox.	By	Auto-populates with name of authorized person enrolling the employee.
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By	Auto-populates with name of authorized person enrolling the employee.																						
2	Click the Descriptive Flexfield [] to display the Additional Delegate Booking Information Window.																						

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Enrolling an Employee, Continued

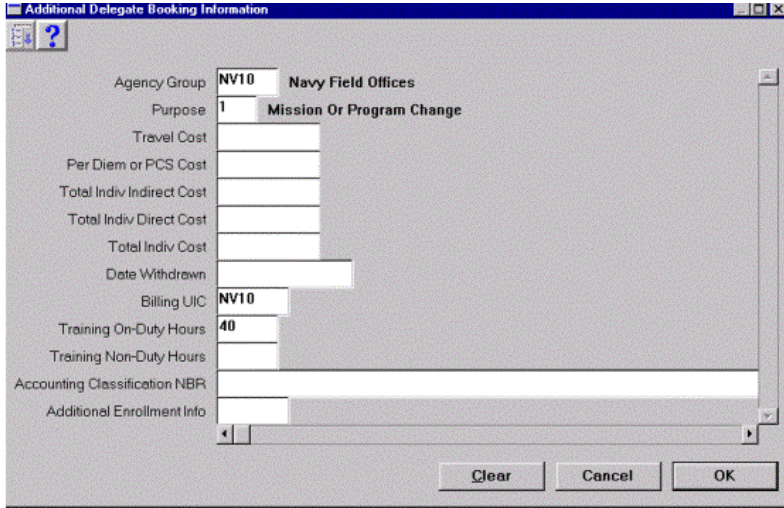
Completing Additional Delegate Booking Information

Step	Action																												
1	<p>On the Additional Delegate Booking Information Window enter data as indicated:</p> <table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td>Agency Group</td><td>Click the LOV to populate the employee's agency. (Required)</td></tr> <tr> <td>Purpose</td><td>Click the LOV. (Required)</td></tr> <tr> <td>Travel Cost</td><td>Type in the dollar amount; will vary by student.</td></tr> <tr> <td>Per Diem or PCS Cost</td><td>Type in the dollar amount.</td></tr> <tr> <td>Total Indiv Indirect Cost</td><td>System totals travel and per diem costs.</td></tr> <tr> <td>Total Indiv Direct Cost</td><td>Type in dollar amount – may vary by student.</td></tr> <tr> <td>Total Indiv Cost</td><td>System totals cost.</td></tr> <tr> <td>Date Withdrawn</td><td>Input date when student does not complete the Event.</td></tr> <tr> <td>Billing UIC</td><td>NV use. (Required)</td></tr> <tr> <td>Training On-Duty Hours</td><td>Type in number of hours. (Required)</td></tr> <tr> <td>Training Non-Duty Hours</td><td>Type in number of hours.</td></tr> <tr> <td>Accounting Classification NBR</td><td>Type in free form up to 120 characters. This should not be used for Purchase card information as it is not secure.</td></tr> <tr> <td>Additional Enrollment Info</td><td>Click the LOV. (AF/NV use only)</td></tr> </table>	Data Field	Description/Action	Agency Group	Click the LOV to populate the employee's agency. (Required)	Purpose	Click the LOV. (Required)	Travel Cost	Type in the dollar amount; will vary by student.	Per Diem or PCS Cost	Type in the dollar amount.	Total Indiv Indirect Cost	System totals travel and per diem costs.	Total Indiv Direct Cost	Type in dollar amount – may vary by student.	Total Indiv Cost	System totals cost.	Date Withdrawn	Input date when student does not complete the Event.	Billing UIC	NV use. (Required)	Training On-Duty Hours	Type in number of hours. (Required)	Training Non-Duty Hours	Type in number of hours.	Accounting Classification NBR	Type in free form up to 120 characters. This should not be used for Purchase card information as it is not secure.	Additional Enrollment Info	Click the LOV. (AF/NV use only)
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Enrolling an Employee, Continued







Completing Additional Delegate Booking Information (continued)

Step	Action
2	<p>Click <OK>.</p> <p>◆ Example of a completed window:</p> 
3	The Enrollment Details Window displays with the top region completed.

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Enrolling an Employee, Continued

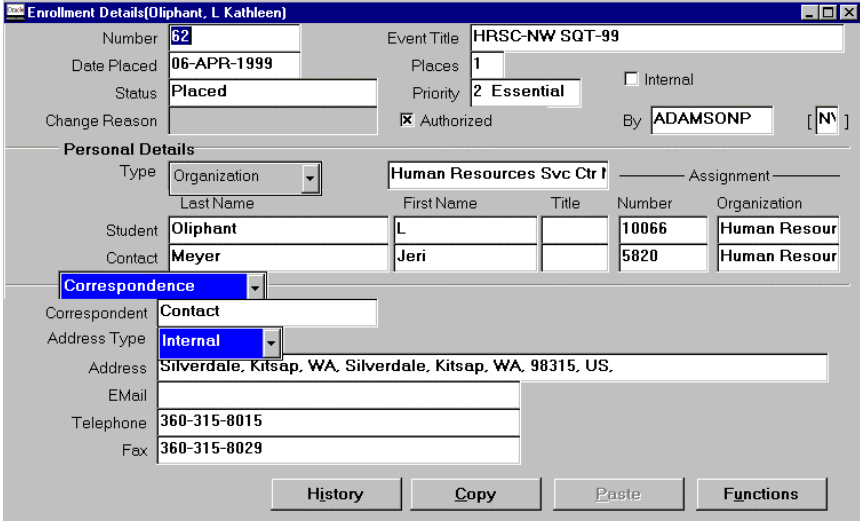
Continuing the Enrollment Details Window

Step	Action																						
1	<p>On the Enrollment Details Window, complete the data fields for the Personal Details Region:</p> <table> <tr> <th>Data Fields and Taskflow Buttons</th><th>Description/Action</th></tr> <tr> <td> Type  </td><td> The drop-down menu defaults to Organization. Note: The other choice is <i>Customer</i> (reserved for contract or military personnel). </td></tr> <tr> <td>Organization Assignment</td><td>Click the LOV and use the reduction criteria to select needed agency. This narrows the search for names.</td></tr> <tr> <td>Student</td><td>Click the LOV to select the name; remaining fields populate with organization assignment.</td></tr> <tr> <td> Contact  </td><td> Click the LOV to select the name, remaining fields populate. Required field. Note: Must be a supervisor, Training Monitor, or person with a Civilian Inbox. The Course Evaluation can then be forwarded to one of their inboxes in lieu of email when the employee has no access to the system. </td></tr> <tr> <td>Correspondence</td><td>Click the drop-down menu; select Correspondence. (optional)</td></tr> <tr> <td>Correspondent</td><td>Click the LOV. (optional)</td></tr> <tr> <td>Address Type</td><td>Click "External" for home address or "Internal" for work address. The remaining portion populates when the organization is selected and will be used for student notifications. (optional) See Chapter 5 on Letters.</td></tr> <tr> <td>Email</td><td>Type in address. (optional)</td></tr> <tr> <td>Telephone</td><td>Type in number. (optional)</td></tr> <tr> <td>Fax</td><td>Type in number. (optional)</td></tr> </table>	Data Fields and Taskflow Buttons	Description/Action	Type 	The drop-down menu defaults to Organization. Note: The other choice is <i>Customer</i> (reserved for contract or military personnel).	Organization Assignment	Click the LOV and use the reduction criteria to select needed agency. This narrows the search for names.	Student	Click the LOV to select the name; remaining fields populate with organization assignment.	Contact 	Click the LOV to select the name, remaining fields populate. Required field. Note: Must be a supervisor, Training Monitor, or person with a Civilian Inbox. The Course Evaluation can then be forwarded to one of their inboxes in lieu of email when the employee has no access to the system.	Correspondence	Click the drop-down menu; select Correspondence. (optional)	Correspondent	Click the LOV. (optional)	Address Type	Click "External" for home address or "Internal" for work address. The remaining portion populates when the organization is selected and will be used for student notifications. (optional) See Chapter 5 on Letters.	Email	Type in address. (optional)	Telephone	Type in number. (optional)	Fax	Type in number. (optional)
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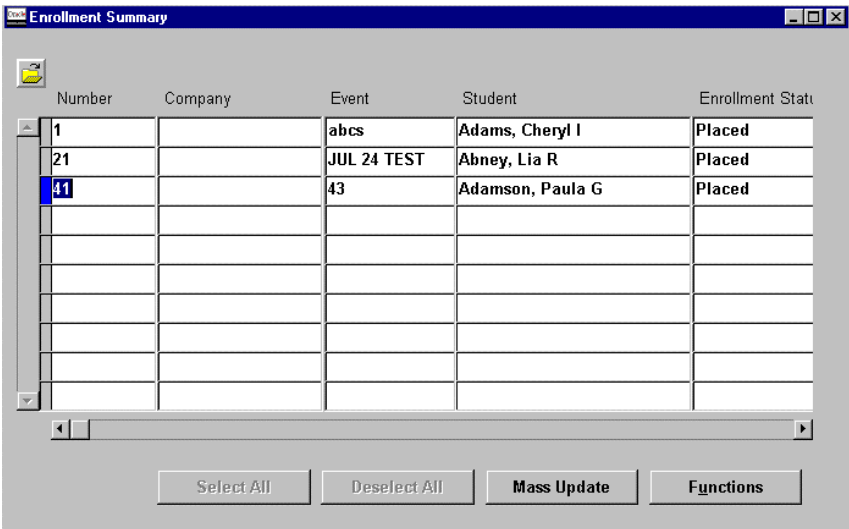
Enrolling an Employee, Continued

Continuing the Enrollment Details Window (continued)

Step	Action										
1 (cont)	<table border="1"> <thead> <tr> <th>Data Fields and Taskflow Buttons</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td><History></td><td>Displays the Student Enrollment History Window of pending or completed Events.</td></tr> <tr> <td><Copy></td><td>Under development.</td></tr> <tr> <td><Paste></td><td>Grayed out.</td></tr> <tr> <td><Functions></td><td>Use to toggle from window to window.</td></tr> </tbody> </table>	Data Fields and Taskflow Buttons	Description/Action	<History>	Displays the Student Enrollment History Window of pending or completed Events.	<Copy>	Under development.	<Paste>	Grayed out.	<Functions>	Use to toggle from window to window.
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<Paste>	Grayed out.										
<Functions>	Use to toggle from window to window.										
2	<p>Click Save. The student's name appears on the window title. ◆ Example:</p> 										
3	Your employee is enrolled. Exit the window.										

Verifying Enrollments

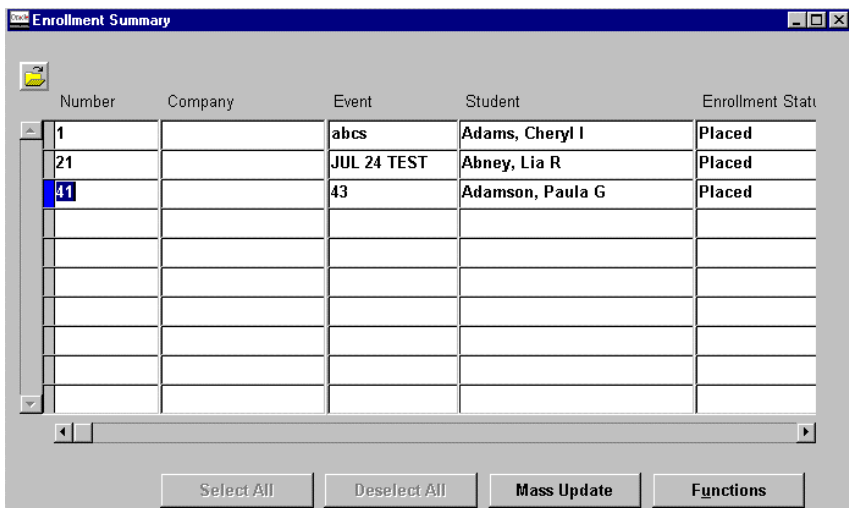

Verifying Enrollments

Step	Action
1	Click < Functions > to toggle back to the Enrollment Summary Window.
2	<p>It displays with the names of the Students, Enrollment Status, etc. Once you have verified the information as correct, download the names into a course roster, change any student enrollment status as needed, click <Functions> to go back to the Enrollment Details Window and enroll additional students.</p> 

Entering Additional Enrollments

Entering Additional Enrollments

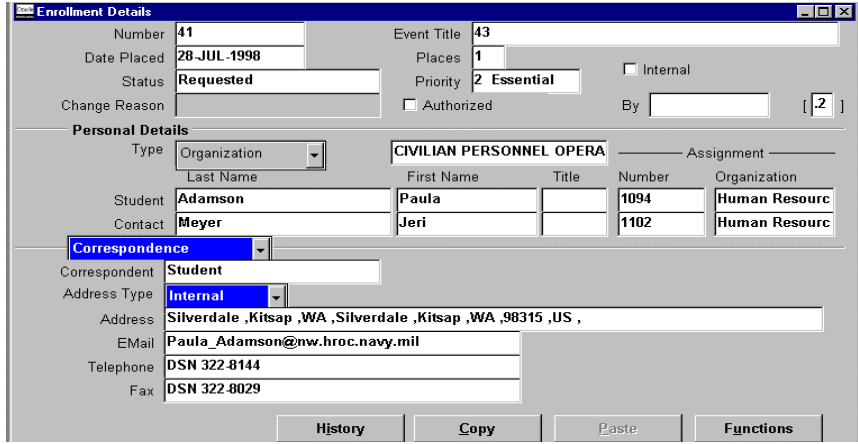

If you are updating several enrollments with the same data item, such as changing their status, or rolling them forward onto a new Event, you can make additional updates in the **Enrollment Summary** Window.

Step	Action
1	On the Navigation List → <i>Enrollment</i> → <i>Student</i> → <Open> .
2	The Search for Event Window displays. Query for the Event. With the <i>Current Record Indicator</i> on the Event you need, exit the window.
3	<p>The Enrollment Summary Window displays with the selected Event and Status of each student. If correct, exit the window.</p> <p>◆ Example:</p>  <p> Note: The system refresh (F8) puts student names in alpha order regardless of the Enrollment Status. Use the Folder Tools Palette to sort by status, if needed, as described in Chapter 2.</p>

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Entering Additional Enrollments, Continued

Entering Multiple Enrollments (continued)

Step	Action
4	<p>The Enrollment Details Window displays with the selected Event.</p> 
5	<p>Click new record  on Toolbar. A blank Enrollment Details Window displays.</p>
6	<p>With your cursor in each needed data field in the top region, press F3. This duplicates the previous entry. The DDF will not duplicate but must be completed separately.</p>
7	<p>Click F3 to populate the Organization, then click the LOV to select student name and contact in the Personal Details Region.</p>
8	<p>Click Save. Repeat the action to enroll the next employee.</p>

Mass Updating Enrollments

Before you Begin

- You can do a mass update of the priority request to the status Placed, and issue a standard confirmation letter. You can do a mass update of the remaining request to the status Waitlisted, and issue a standard waiting list letter.
- If a placed student cancels, you can choose the highest priority Waitlisted student to fill the vacancy. You can do a mass update of all Waitlisted students to roll them over to the next scheduled Event for the Activity.

Mass Updating Enrollments Decision Table

Use the priority levels you entered for the enrollment for mass updating. Use the following decision table to help with your levels.

If...	Then...
You previously entered more Enrollments than available quotas	<ul style="list-style-type: none"> • You can use the priority levels to decide which enrollments to place and which to put on a waiting list in case of cancellations. • You can do a mass update of the priority requests to the status Placed and issue a standard confirmation letter. • You can do a mass update of the remaining requests to the status Waitlisted and issue a standard waiting list letter.
A placed student cancels	<ul style="list-style-type: none"> • You can choose the highest priority waitlisted student to fill quota. • You can do a mass update of all waitlisted students to roll them over to the next scheduled Event for the activity.

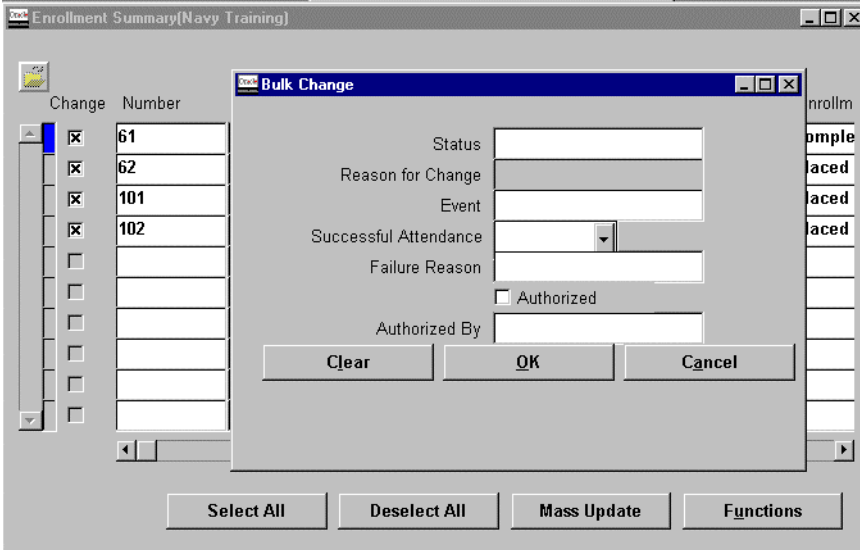
Mass Updating Enrollments

Step	Action
1	On the Navigation List → <i>Enrollment</i> → <i>Student</i> → <Open> .
2	The Search for Event Window displays. Query for the Event you wish to mass enroll. Exit the window.

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Mass Updating Enrollments, Continued

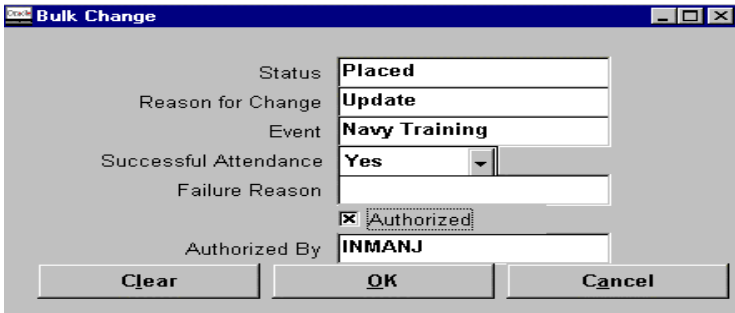

Mass Updating Enrollments (continued)

Step	Action
3	The Enrollment Summary Window displays. Click the correct Event and click <Mass Update> .
4	<p>The Bulk Change Window displays with the Enrollment Summary Window behind it. Move the Bulk Change Window, if needed, in order to see the Taskflow buttons and Change checkbox simultaneously.</p> <p>Click <Select All>.</p> <p>Deselect the Change checkbox for specific enrollments you do not want to update or leave all enrollments checked if you want to update them all.</p> 
5	Click <Deselect All> if you do not want to update any enrollments for this Event.

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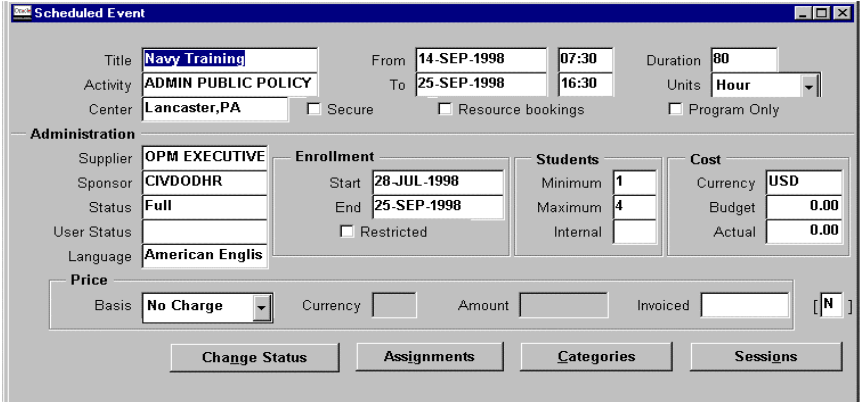

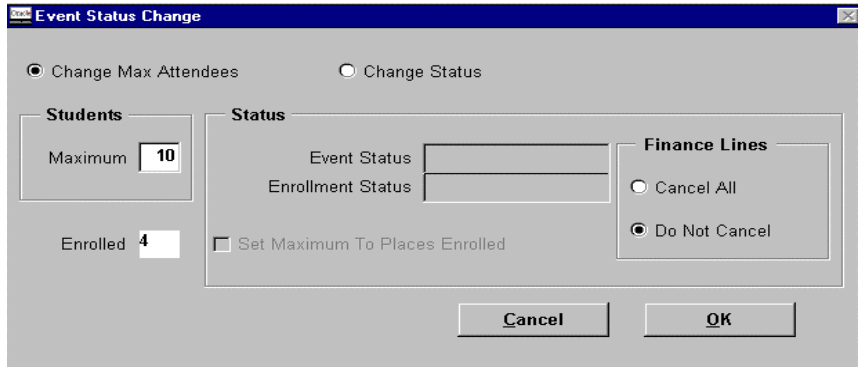
Mass Updating Enrollments, Continued

Mass Updating Enrollments (continued)

Step	Action																
6	<p>Select the new values you want to apply in the Bulk Change window. Enter a new Event if you want to roll forward the enrollments into a new Event.</p> <p>Complete the following data fields:</p>  <p> Note: OTA changes all the enrollment statuses en masse for you (and rolls the enrollments forward onto a new Event, if entered).</p> <table border="1"> <thead> <tr> <th>Data Fields</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>Status</td><td>Click the LOV and select new status.</td></tr> <tr> <td>Reason for Change</td><td>Click the LOV and select reason for change.</td></tr> <tr> <td>Event</td><td>Click the LOV to select the Event.</td></tr> <tr> <td>Successful Attendance</td><td>Click “Yes” or “No” from the drop-down menu. Not used by DoD.</td></tr> <tr> <td>Failure Reason</td><td>Click the LOV and select the reason.</td></tr> <tr> <td>Authorized Checkbox</td><td>Select the checkbox.</td></tr> <tr> <td>Authorized By</td><td>Auto-populates name of person.</td></tr> </tbody> </table>	Data Fields	Description/Action	Status	Click the LOV and select new status.	Reason for Change	Click the LOV and select reason for change.	Event	Click the LOV to select the Event.	Successful Attendance	Click “Yes” or “No” from the drop-down menu. Not used by DoD.	Failure Reason	Click the LOV and select the reason.	Authorized Checkbox	Select the checkbox.	Authorized By	Auto-populates name of person.
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Authorized By	Auto-populates name of person.																
7	Click <OK>. The Enrollment Summary Window displays.																
8	Exit the window.																

Changing Maximum Attendees

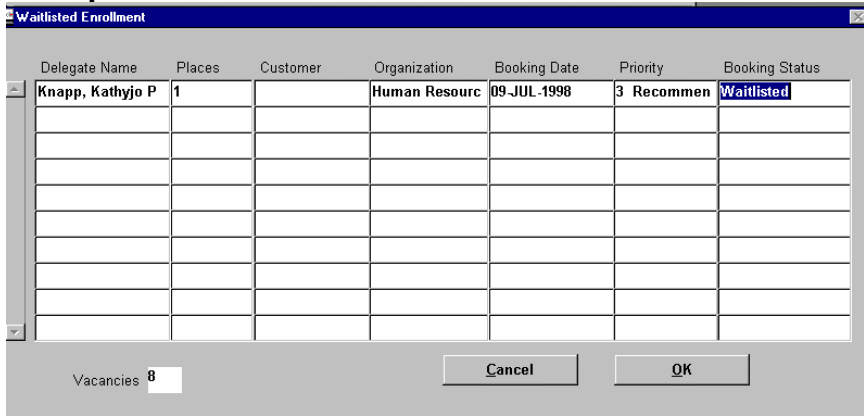
Changing Maximum Attendees

Step	Action
1	<p>On the Navigation List → <i>Events</i> → <i>Scheduled</i> → <Open>. The Scheduled Event Window displays. Query for the Event.</p> <p> Note: If the Secure box is selected, you can only update the Event if you are assigned to the organization that is administering the Event.</p> 
2	Click <Change Status> . The Event Status Window displays.
3	<p>Click the Change Max Attendees radio button and change the maximum number in the Students Region. The number currently enrolled displays in the box below it.</p> <p>Click <OK>.</p> <p> Note: You cannot reduce the maximum below the number currently enrolled with the Status <i>Placed</i> or <i>Attended</i> on the Scheduled Event Window.</p> 

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Changing Maximum Attendees, continued

Changing Maximum Attendees (continued)

Step	Action		
4	<p>If the Event was previously Full and there is a waiting list, a pop-up box notifies you the “Waiting List Exists” and asks if you want to select a student from the waiting list.</p> <table border="1"> <tr> <td> <p>Click <Yes> to select from the Waiting List</p> <ul style="list-style-type: none"> The Waitlisted Enrollment Window displays. (The number of vacancies for the Event appears in a box at the bottom of the window). Select the student you want to enroll on the Event by positioning the cursor in the Booking Status field and selecting <i>Placed</i> from the LOV. (This enables you to fill the spaces before someone else enters new enrollments for the Event.) Click <OK>. </td><td> <p>Click <No> to save the new maximum numbers without selecting from the Waiting List</p> <ul style="list-style-type: none"> The Event Status Change Window displays. The Event status returns to Normal and you and other users can fill the spaces as normal. Click <OK>. To check the changes you have made, re-query the Event and check to see if the Maximum Number field reflects the new number. </td></tr> </table> <p>◆Example:</p> 	<p>Click <Yes> to select from the Waiting List</p> <ul style="list-style-type: none"> The Waitlisted Enrollment Window displays. (The number of vacancies for the Event appears in a box at the bottom of the window). Select the student you want to enroll on the Event by positioning the cursor in the Booking Status field and selecting <i>Placed</i> from the LOV. (This enables you to fill the spaces before someone else enters new enrollments for the Event.) Click <OK>. 	<p>Click <No> to save the new maximum numbers without selecting from the Waiting List</p> <ul style="list-style-type: none"> The Event Status Change Window displays. The Event status returns to Normal and you and other users can fill the spaces as normal. Click <OK>. To check the changes you have made, re-query the Event and check to see if the Maximum Number field reflects the new number.
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5	The Event status changes to “Full” when the maximum is reached.		

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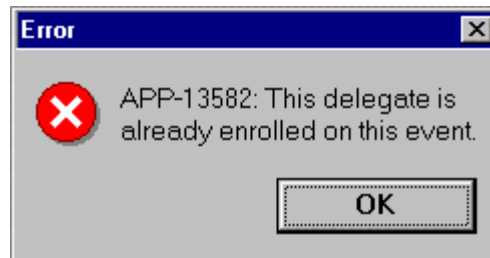
Double-Booking an Enrollment

Double-Booking Enrollments

OTA prevents you from double-booking students with the following statuses into events:

- *Placed*
- *Attended*

A message box displays which indicates the employee is already enrolled:



However, OTA does not prevent you double-booking students with the following statuses into events:

- *Requested*
- *Waitlisted*
- *Cancelled*

It assumes that until a student is Placed or has Attended an event, you can book them into another, clashing event. This provides you with some flexibility in the way you define and manage booking students into events.



Note: OTA only checks for double-bookings when the status of the event is *Confirmed*. This enables you to double-book students while you are planning an event and, perhaps, testing various event date scenarios.

Canceling an Enrollment

Purpose This procedure will guide you through the steps to cancel an enrollment.

See Also



In this module:

Chapter 2, Administering Training
 Sections: Defining an Activity
 Scheduling an Event/Session

Who Does This



Components will determine who will have this responsibility.

Before You Begin

- If the Event was previously **Full** and there is a waiting list, the system displays a pop up box notifying you the “waiting list exists” and asks if you want to select a student from the waiting list.
 - The system also advises you if the Event has reached or exceeded its maximum number of student enrollments.
 - When you cancel an Event, OTA automatically cancels all enrollments.
-


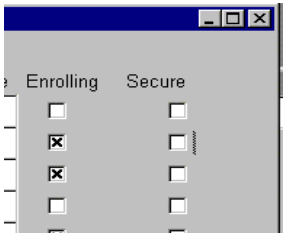
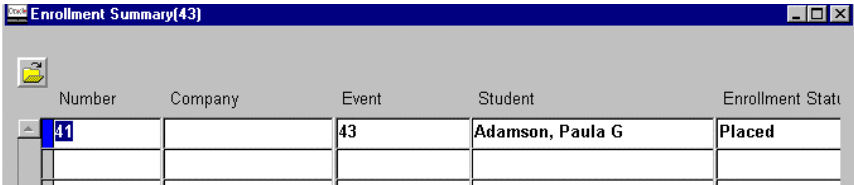
Canceling an Enrollment

Step	Action
1	On the Navigation List → <i>Enrollments</i> → <i>Student</i> → <Open> .
2	The Search for Event Window displays.

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Canceling an Enrollment, Continued

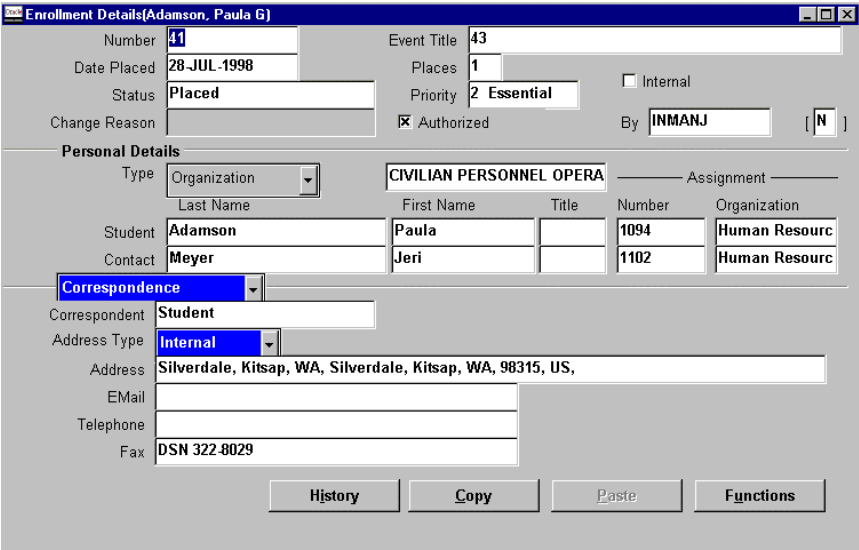

Canceling an Enrollment (Continued)

Step	Action
3	<p>Query for the Event.</p>  <p>Use the bottom scroll bar to review the remaining columns and checkboxes.</p> 
4	With the Current Record Indicator on the selected Event, exit the window.
5	<p>The Enrollment Summary Window displays. Move the Current Record Indicator to the Event (student) you wish to cancel and exit the window.</p> 
6	With the cursor in the Enrollment status column, click the LOV and select "Cancelled."
7	Click Save and exit the window.

Continued on next page

Canceling an Enrollment, Continued

Canceling an Enrollment (Continued)

Step	Action
6	<p>The Enrollment Details Window displays with the enrollee's name next to the window name.</p> <p>The Status data field displays with Cancelled.</p> <p>Exit the window.</p> <p>Click <OK>.</p> 
7	<p>The Status data field changes to Cancelled. Click Save on the Toolbar.</p> <p> Note: If the Event was previously Full and there is a waiting list, a pop-up box notifies you the Waiting List Exists and asks if you want to select from it.</p>

Building External Students

Purpose

This section will guide you through the process of building “external” students – those personnel who may attend your training but are not in your database. Examples might be military personnel, contract employees, or employees from city or state who share mutual training needs.

Who Has Access




Components will determine who will be assigned the role of External User.

Before You Begin

- You must be in the Role of External User to build an External Student.
- A numbering or naming convention for Social Security number would assist in identifying external students for reporting purposes, i.e., begin all with “888” or another number.
- External Students will not be able to process TRFs or other personnel actions. See Module 4, Chap 2, Building An External User for further information.

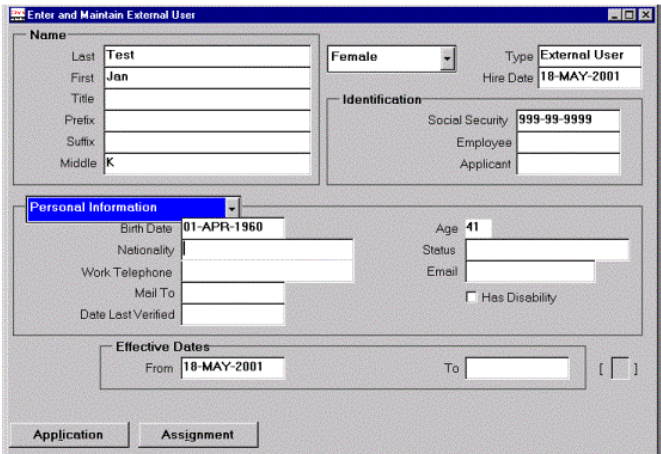
Building External Students

Step	Action
1	On the Responsibilities Window, select CIVDOD External User.
2	On the Navigator Window, select <i>Employee Enter and Maintain</i> . 

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Building External Students, Continued

Building External Students (continued)

Step	Action																										
3	<p>The Enter and Maintain External User Window displays. Complete the following data fields:</p> 																										
	<table border="1"> <thead> <tr> <th>Data Fields</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>Name Region:</td><td></td></tr> <tr> <td>Last</td><td>Type in last name</td></tr> <tr> <td>First</td><td>Type in first name</td></tr> <tr> <td>Gender Drop Down Menu:</td><td></td></tr> <tr> <td>Type</td><td>Click LOV and select External User</td></tr> <tr> <td>Hire Date</td><td>Current date auto-populates</td></tr> <tr> <td>Identification Region:</td><td></td></tr> <tr> <td>Social Security</td><td>Type in fictional number</td></tr> <tr> <td>Personal Information:</td><td></td></tr> <tr> <td>Birth Date</td><td>Type in fictional date</td></tr> <tr> <td>Age</td><td>Auto-populates from birth date entry</td></tr> <tr> <td>Effective Dates</td><td>Auto-populates today's date</td></tr> </tbody> </table>	Data Fields	Description/Action	Name Region:		Last	Type in last name	First	Type in first name	Gender Drop Down Menu:		Type	Click LOV and select External User	Hire Date	Current date auto-populates	Identification Region:		Social Security	Type in fictional number	Personal Information:		Birth Date	Type in fictional date	Age	Auto-populates from birth date entry	Effective Dates	Auto-populates today's date
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4	Click Save. Your “external student” can now be selected from the database when you complete the enrollment process.																										